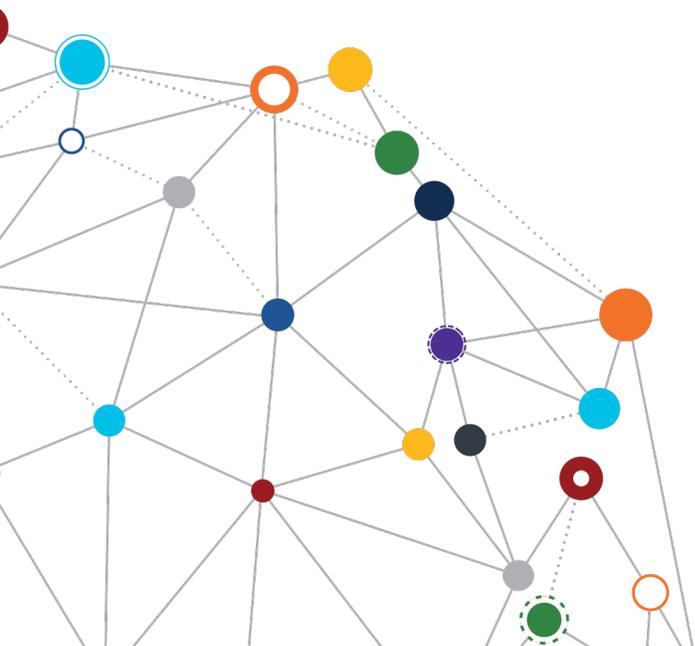




VS GUI User Guide Addendum

Release 1.7.1 Update



VA



U.S. Department of Veterans Affairs
Office of Information and Technology
Enterprise Program Management Office



Revision History

Date	Revision	Description	Author
09/09/2020	1.2	Updated install period, table of contents and list of figures.	REDACTED
07/23/2020	1.1	All changes accepted, updated Figure 3, 8, 9, and 12 with new screenshots, updated table of contents and list of figures.	REDACTED
07/13/2020	1.0	Created 1.7.1 Release Update Feature Documentation	REDACTED

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1 Introduction

Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Graphical User Interface (VS GUI) module is the Windows GUI version of the Patient Information Management System (PIMS) Scheduling module. It provides appointment management functions included in PIMS Scheduling, but with the added convenience and usability of a GUI.

1.1 Purpose

The Veterans Health Administration (VHA) Office of Veterans Access to Care (OVAC) requested an enterprise enhancement for the VS package that supports COVID-19 response. The enhancement reduces operating costs for VHA and improves operational efficiencies, resulting in patient-centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time for scheduling patients.

1.2 Overview

VS GUI is a software module that allows schedulers to make appointments quickly by viewing multiple appointment request types and multiple clinics in one screen. A scheduler can easily view patient requests for service, find the next available open appointment, view the provider's availability in multiple clinics, and track a patient's appointment process. Refer to [System Summary](#) for a more detailed description of VS GUI functionality.

1.3 Disclaimers

1.3.1 Software Disclaimers

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.3.2 Documentation Disclaimers

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

1.4 Project References

1.4.1 Information

The VS GUI points of contact (POCs) include:

» REDACTED

VSE Resources

» Veterans Health Administration (VHA) VSE SharePoint: REDACTED

» VA Software Document Library (VDL) – Scheduling (VSE manuals near the bottom):

<https://www.va.gov/vdl/application.asp?appid=100>

» National Return to Clinic (RTC) Order: REDACTED

2 System Summary

The VSE project delivers a series of enhancements to legacy VistA Scheduling Version 5.3 via the VS GUI application.

This update is for the nationally released version 1.7.1, which includes VS GUI 1.7.1 R1 and VistA patch SD*5.3*745. At time of publishing, install period is projected for September 2020. This update includes the following:

- » Ability to view Computerized Patient Record System (CPRS) consult tab details from Request Management (RM) Grid.
- » Update Clinically Indicated Date (CID) labels to Patient Indicated Date (PID) throughout the application.
- » Ability to save updated PID for an appointment previously cancelled by patient or no show.
- » Addition of new cancellation reason “PANDEMIC” to use for COVID-19 related cancellations.
- » Addition of columns to the RM grid displaying the number of contact attempts (phone) and the last date a letter contact attempt was made.
- » Allow View Only users to access contact attempts screen.
- » Realignment of RM grid to improve logic and increase real estate.

3 Key Feature Updates in Version 1.7.1

3.1 Ability to View CPRS Consult Tab Details from RM Grid

Schedulers can see the CPRS Consult tab detail as the View Request option for Consults. Right-click on a consult in the RM Grid and navigate to APPT/Veteran Disposition > View Request. This will open consult details found in CPRS.

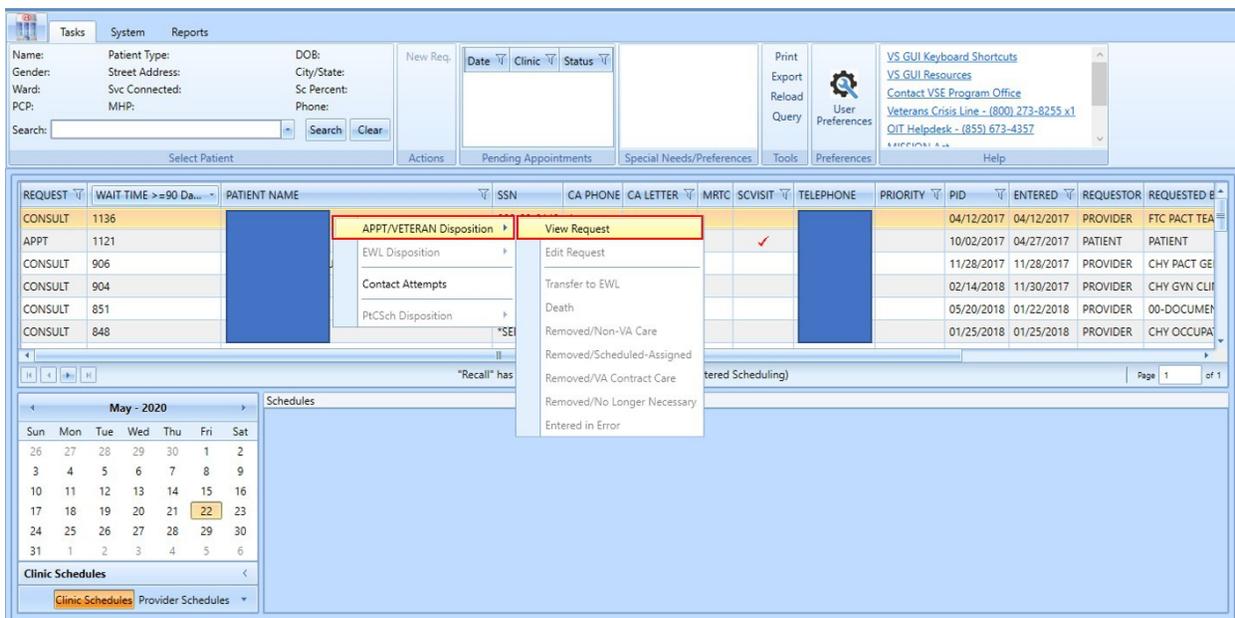


Figure 1: Display CPRS Consult Tab Details

This is the Consult View in VS GUI. This view is the top part of the consult view and the scheduler will easily see the PC Provider, Primary Eligibility, Requesting Provider and the Urgency.

Current PC Provider:
Current PC Team: TEAM FTC 2
Current Pat. Status: Outpatient
Primary Eligibility: SERVICE CONNECTED 50% to 100%(VERIFIED)
Patient Type: SC VETERAN
OEF/OIF: NO

Service Connection/Rated Disabilities
SC Percent: 100%
Rated Disabilities: BIPOLAR DISORDER (100%)
IRRITABLE COLON (10%)
HEMORRHOIDS (0%)

Order Information
To Service: PHARM.AC.INTERRUPTION.OUTPT
From Service: CHY ANTICOAG
Requesting Provider:
Service is to be rendered on an OUTPATIENT basis
Place: Consultant's choice
Urgency: Routine
Clinically Ind. Date: Jan 29, 2018
Orderable Item: PHARM.AC.INTERRUPTION.OUTPT
Consult: Consult Request
Provisional Diagnosis: DVT
Reason For Request:
ANTICOAGULATION INTERRUPTION (BRIDGE THERAPY) CONSULT

OK

Figure 2: Patient Consult Detail Window - 1

This bottom part of the Consult View will allow the scheduler to view the Status and the Facility Activity of the consult.

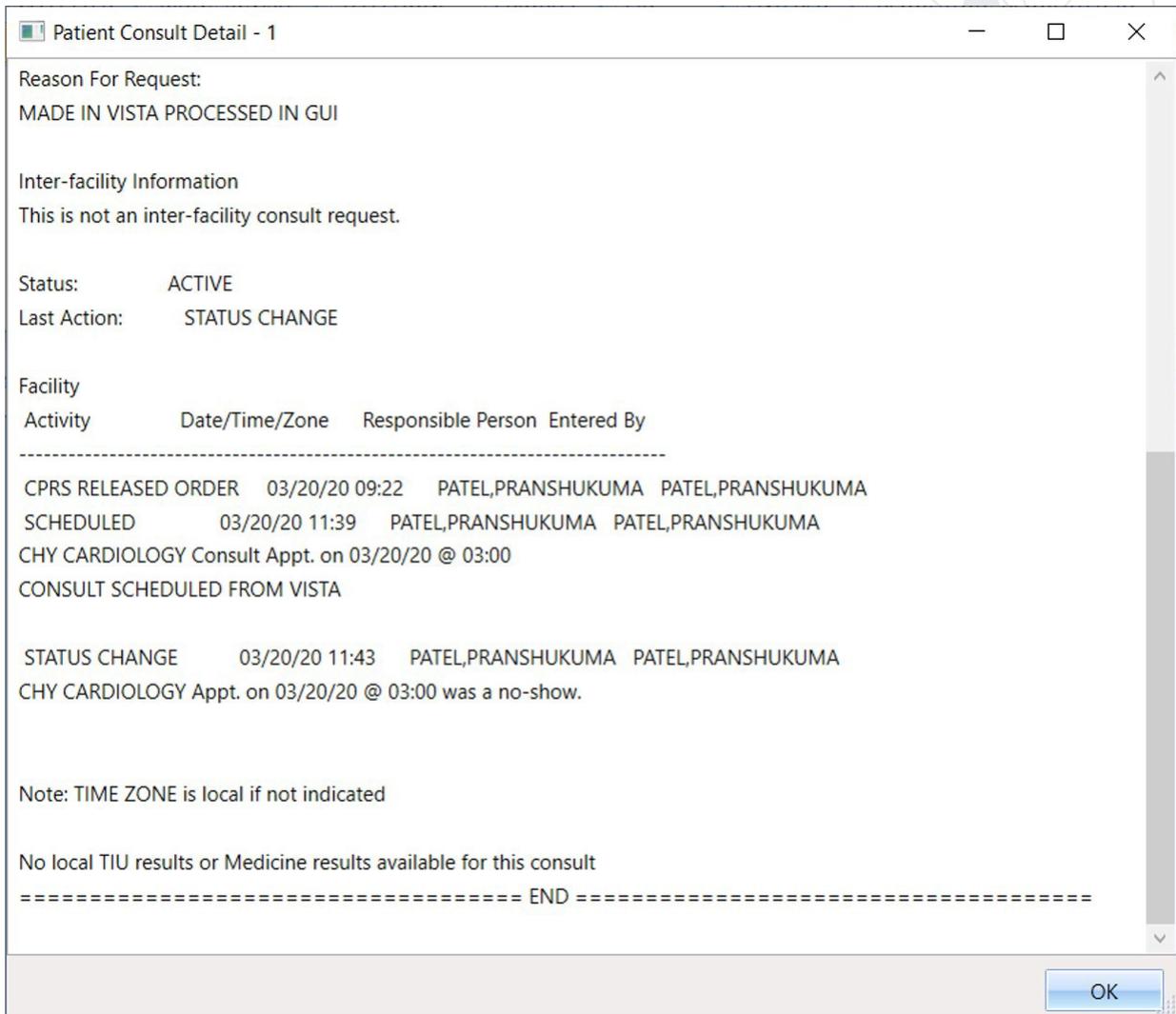


Figure 3: Patient Consult Detail Window - 2

3.2 Update CID Date Label to PID Throughout the Application

The CID date label has been updated to reflect PID in all views of the application. The CID/Preferred Date is replaced with PID Date in the following locations: RM Grid(headers), RM Grid(export), RM Grid(print), User Preferences, New APPT Request Window and View Request Window.

REQUEST	WAIT TIME >=90 Da...	PATIENT NAME	SSN	CA PHONE	CA LETTER	MRTC	SCVISIT	TELEPHONE	PRIORITY	PID	ENTERED
CONSULT	1136			1				(999) 999-9999		04/12/2017	04/12/2017
APPT	1121			11	05/20/2020		✓	(555) 555-5555		10/02/2017	04/27/2017
CONSULT	906							(444) 444-4444		11/28/2017	11/28/2017
CONSULT	904							(444) 444-4444		02/14/2018	11/30/2017
CONSULT	851							(777) 777-7777		05/20/2018	01/22/2018
CONSULT	848							(777) 777-7777		01/25/2018	01/25/2018

Figure 4: CID Date Label Updated to PID in RM View

When viewing the appointment request, CID has been changed to PID.

View Appointment Request for

Patient Information

Name: [Redacted] DOB: [Redacted] SSN: [Redacted]

Gender: Male Institution: CHEYENNE VA MEDICAL Originating Date: 04/27/2017

Originating User: [Redacted] Priority Group: [Redacted] Ethnicity: [Redacted]

Race: [Redacted] Address: [Redacted] City: [Redacted] State: WY Zip Code: [Redacted]

Country: United States Phone (residence): (555) 555-5555 Phone (work): [Redacted]

Bad Address? Svc Related Veteran

Special Needs/Preferences

NOTE: Ctrl-p to Edit the Patient Information / Special Needs / Preferences

Request Information

Clinic Service/Specialty **PID Date:** 10/02/2017 Appointment Type: REGULAR

Requested By: PATIENT Provider: [Redacted] Status: NEW

Multiple Appointments Required

Comment: [Redacted]

OK Cancel

Figure 5: CID Date Label Updated to PID in Appointment Request



3.3 Ability to Save Updated PID for an Appointment Previously Cancelled by Patient or No Show

When rescheduling a previously cancelled by patient or no-show appointment, the scheduler will be able to enter a new PID date prior to rescheduling. In the past the scheduler would have no option to change the original date entered in the request after the initial cancellation.

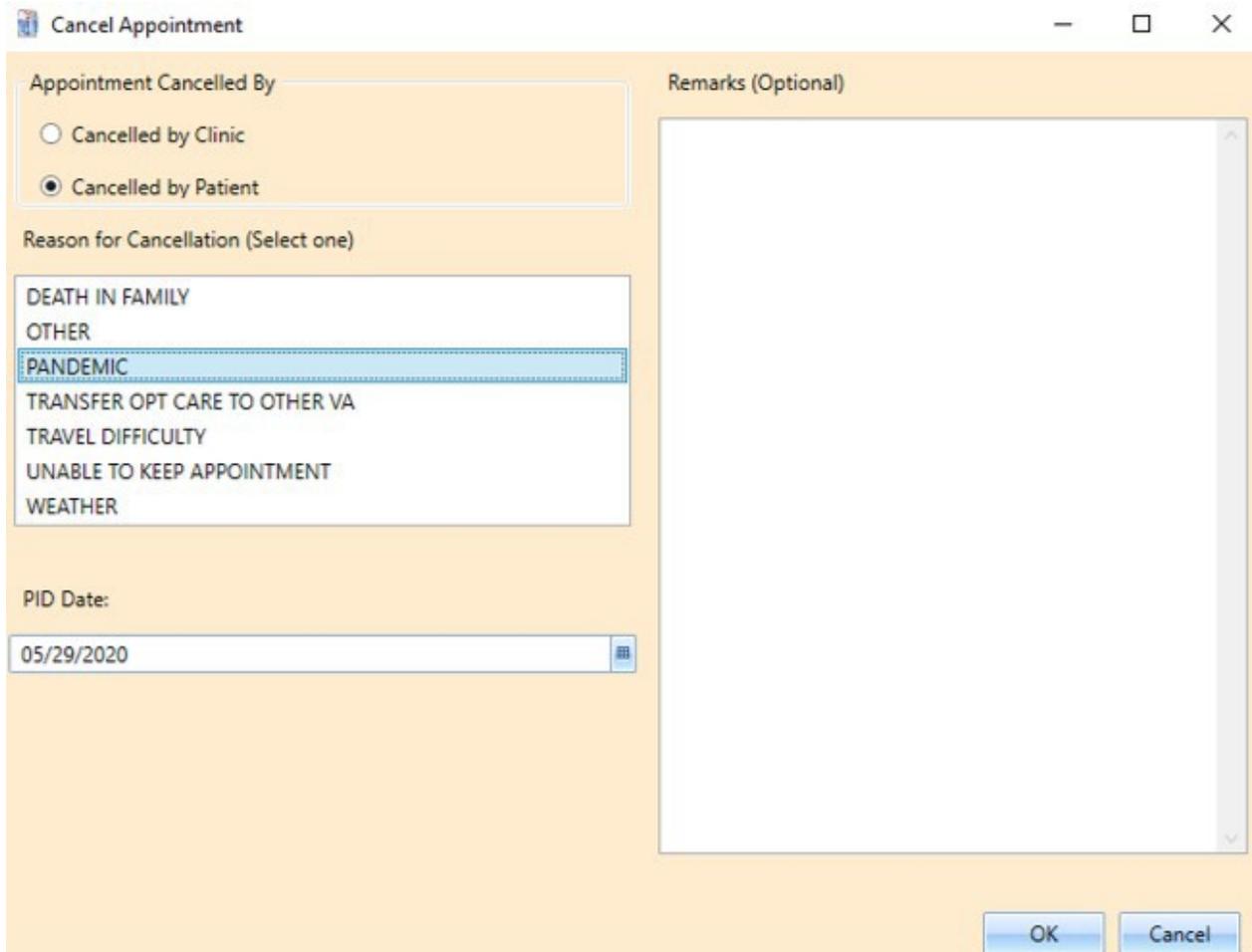
The screenshot shows a web-based form titled "Edit Appointment Request for". The form is divided into several sections:

- Patient Information:** Fields for Name, DOB, SSN, Gender (Male), Institution (CHEYENNE VA MEDICAL), Originating Date (05/22/2020), Originating User, Priority Group (GROUP 3), Ethnicity (HISPANIC OR LATINO), Race, Address, City, State (WY), Zip Code, Country (United States), Phone (residence) ((111) 111-1111), and Phone (work). There are also checkboxes for "Bad Address?", "Svc Related" (checked), and "Veteran".
- Special Needs/Preferences:** A section with a note: "NOTE: Ctrl-p to Edit the Patient Information / Special Needs / Preferences".
- Request Information:** Radio buttons for "Clinic" (selected) and "Service/Specialty". A dropdown for "CHY ANTICOAG". A "PID Date:" field with a calendar icon, currently showing "06/18/2020". A dropdown for "Appointment Type" set to "REGULAR". A "Requested By" dropdown set to "PATIENT". A checkbox for "Multiple Appointments Required".
- Calendar:** A calendar for June 2020. The date 18 (Friday) is highlighted in yellow.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Figure 6: PID Can be Updated to Reflect Change After Cancellation by Patient

3.4 Addition of new cancellation reason “PANDEMIC” to use for COVID-19 related cancellations

Schedulers will now be able to choose PANDEMIC as a reason for cancellation. In the past the scheduler would have to choose “Other” and then type remarks as indicated by local/national guidelines.



The screenshot shows a 'Cancel Appointment' dialog box with the following elements:

- Appointment Cancelled By:** Two radio buttons: 'Cancelled by Clinic' (unselected) and 'Cancelled by Patient' (selected).
- Reason for Cancellation (Select one):** A list box containing the following options: DEATH IN FAMILY, OTHER, PANDEMIC (highlighted), TRANSFER OPT CARE TO OTHER VA, TRAVEL DIFFICULTY, UNABLE TO KEEP APPOINTMENT, and WEATHER.
- PID Date:** A text field containing '05/29/2020'.
- Remarks (Optional):** A large empty text area for additional notes.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Figure 7: PANDEMIC as Cancellation Option

3.5 Addition of Contact Attempt Column to RM Grid

Schedulers will now see the number of phone Contact Attempt (CA) and the date a CA letter was sent when viewing the RM Grid. The contact attempts view will show the attempted date/time, comments from the scheduler, and the name of the scheduler who entered them.

The screenshot displays the VistA Scheduling interface. At the top, there are tabs for 'Tasks', 'System', and 'Reports'. The patient information section includes fields for Name, Gender, Ward, PCP, Patient Type (SC VETERAN), Street Address, Svc Connected (YES), MHP, DOB, City/State, Sc Percent (10), and Phone ((222) 222-2222). A search bar is present with 'Search' and 'Clear' buttons. Below this is a 'Pending Appointments' table with columns for Date, Clinic, and Status. The table shows three appointments for June 23, 24, and 24, 2020, all at CHY ACUTE CARE 2. The status for the first and third appointments is 'NO ACTION TAKEN', while the second is 'CANCELLED BY PATIENT'. A 'Special Needs' section on the right indicates 'TUESDAY MORNING REMARKS: ADDED DA'. The main 'REQUEST' grid has columns for REQUEST, WAIT TIME, PATIENT NAME, SSN, CA PHONE, CA LETTER, MRTC, SCVISIT, TELEPHONE, PRIORITY, PID, and EN. A row for 'APPT 27' is highlighted, and a context menu is open over it, with 'Contact Attempts' selected and highlighted in yellow. Below the grid is a calendar for July 2020, and a 'Clinic Schedules' section with a dropdown menu for selecting a clinic.

Figure 8: Display Contact Attempt Information in the RM Grid

To document new contact attempt information, select the requested patient’s name from the list in the request grid, right-click and from the dialog box select Contact Attempts. The Contact Attempt dialog box displays showing the request information about the patient and the option to enter Call or Letter contact attempt. When submitting the new contact attempt details the information will be displayed at the bottom of the new Contact Attempt screen and highlighted in Green.



Request Information

Patient Name:
 Desired Appt Date: **06/25/2020**
 Home Phone: **(222) 222-2222**
 Work Phone:

Clinic Name: **C/T CHY TEST1.7.1**
 Request Type: **APPT**
 Cell Phone: **(222) 222-2222**

New Contact Attempt

Contact Type: Call Letter
 Date/Time: 07/22/2020 @ 15:46:04
 Comments:

Contact Attempts

Attempted Date/Time	Current	Type	Comments	Entered By	Entered Date/Time
7/22/2020 3:45:08 PM	True	Call	CALLED PATIENT TEST		7/22/2020 3:46:04 PM
7/22/2020 3:30:00 PM	True	Letter	LETTER SENT TO PATIENT		7/22/2020 3:45:08 PM

Figure 9: New Contact Attempt Entry Window

3.6 Allow View Only Users to Access Contact Attempts Screen

View-Only users will have the ability to view when a patient was last contacted. The screen layout remains the same for View-Only users, but certain options will be grayed out. View only users cannot make any changes or submit any contact attempts. The figure below shows the drop down with “Contact Attempts” as an available option when the user right clicks on the request.

Tasks

Name: Patient Type: SC VETERAN DOB:
 Gender: M Street Address: City/State:
 Ward: Svc Connected: YES Sc Percent: 10
 PCP: MHP: Phone: (888) 888-8888

REQUEST | WAIT TIME All Days | PATIENT NAME | SSN | CA PHONE | CA LETTER | MRTC | SCVISIT | TELEPHONE | PRIORITY | PID | ENTERED | REQUESTOR | REQUESTED BY

REQUEST	WAIT TIME All Days	PATIENT NAME	SSN	CA PHONE	CA LETTER	MRTC	SCVISIT	TELEPHONE	PRIORITY	PID	ENTERED	REQUESTOR	REQUESTED BY
PtCSch 791								(888) 888-8888	GROUP 3	04/04/2018	04/04/2018	PROVIDER	
PtCSch 655								(888) 888-8888	GROUP 3	08/18/2018	08/21/2017	PROVIDER	

June - 2020

GLY PACT TEAM 3 PRE-VISIT AM

3 - 9 June 2020

03 Wednesday 04 Thursday 05 Friday 06 Saturday 07 Sunday 08 Monday 09 Tuesday

6:00 AM :15 :30 :45
 7:00 AM :15 :30 :45
 8:00 AM :15

Availability: Unavailable Available Overbook

Appointments: 1.New 2.Walk In 3.No Show 4.Check In 5.Check Out

Figure 10: RM Grid View for “View Only” Users



Attempted Date/Time	Current	Type	Comments	Entered By	Entered Date/Time
6/3/2020 1:43:45 PM	True	Call	CALLED HOME PHONE		6/3/2020 1:45:22 PM
6/3/2020 1:41:31 PM	True	Call	TEST		6/3/2020 1:41:37 PM

Figure 11: Contact Attempt View for “View Only” Users

3.7 Realigning of RM grid to improve logic and increase real estate

There are changes to existing RM grid field titles and the default order which can be changed with the User Preferences option. Any changes from the default order can also be saved to the user’s personal preference.

1. Updated headers for existing fields
 - Request Type = Request
 - CID/Preferred Date = PID
 - Entered/RR No Date = Entered
2. The new default sort order of the RM Grid is as follows:
 - Request
 - Wait Time
 - Patient Name
 - SSN (*repositioned*)
 - CA Phone (Contact Attempts/Phone - *New Field*)
 - CA Letter (Contact Attempts/Letter - *New Field*)
 - MRTC
 - SCVisit
 - Telephone
 - Priority
 - PID
 - Entered
 - Requestor
 - Requested By
 - Clinic/Service
 - Comment

3.8 Validate VS GUI Version Matches Current Build Release

After the introduction of 1.7.0.1 VS GUI, if a user tries to login with the wrong version of VS GUI, the user will receive a popup message requiring them to install the latest VS GUI version.

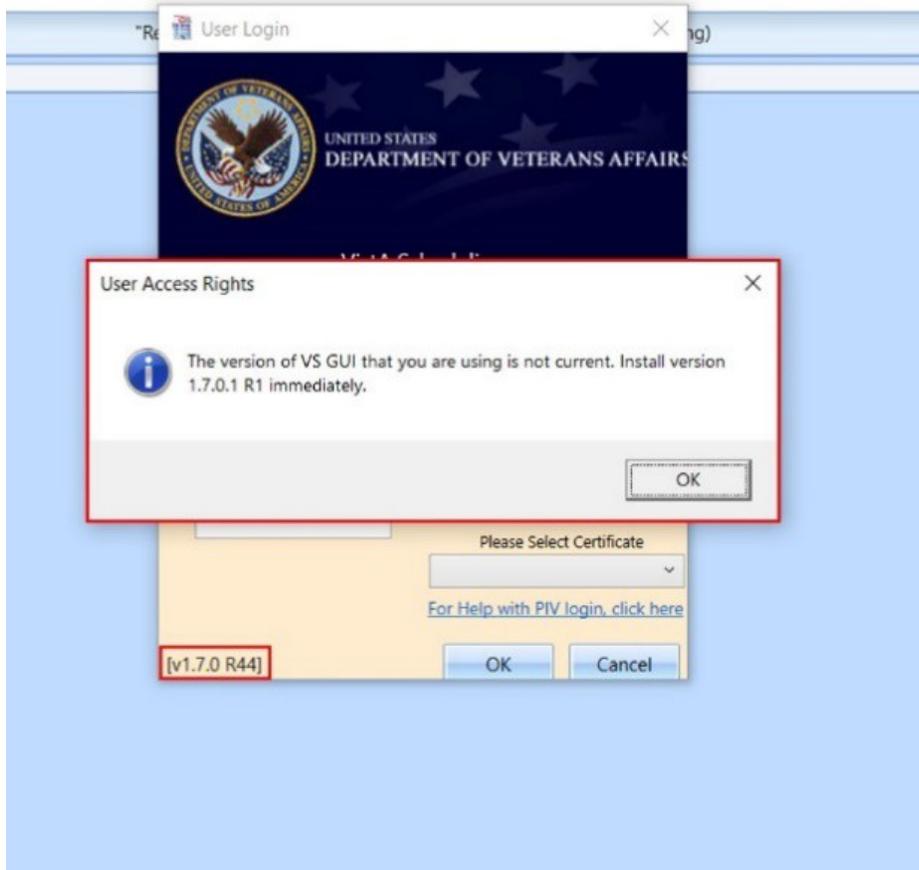


Figure 12: Wrong VS GUI version error message